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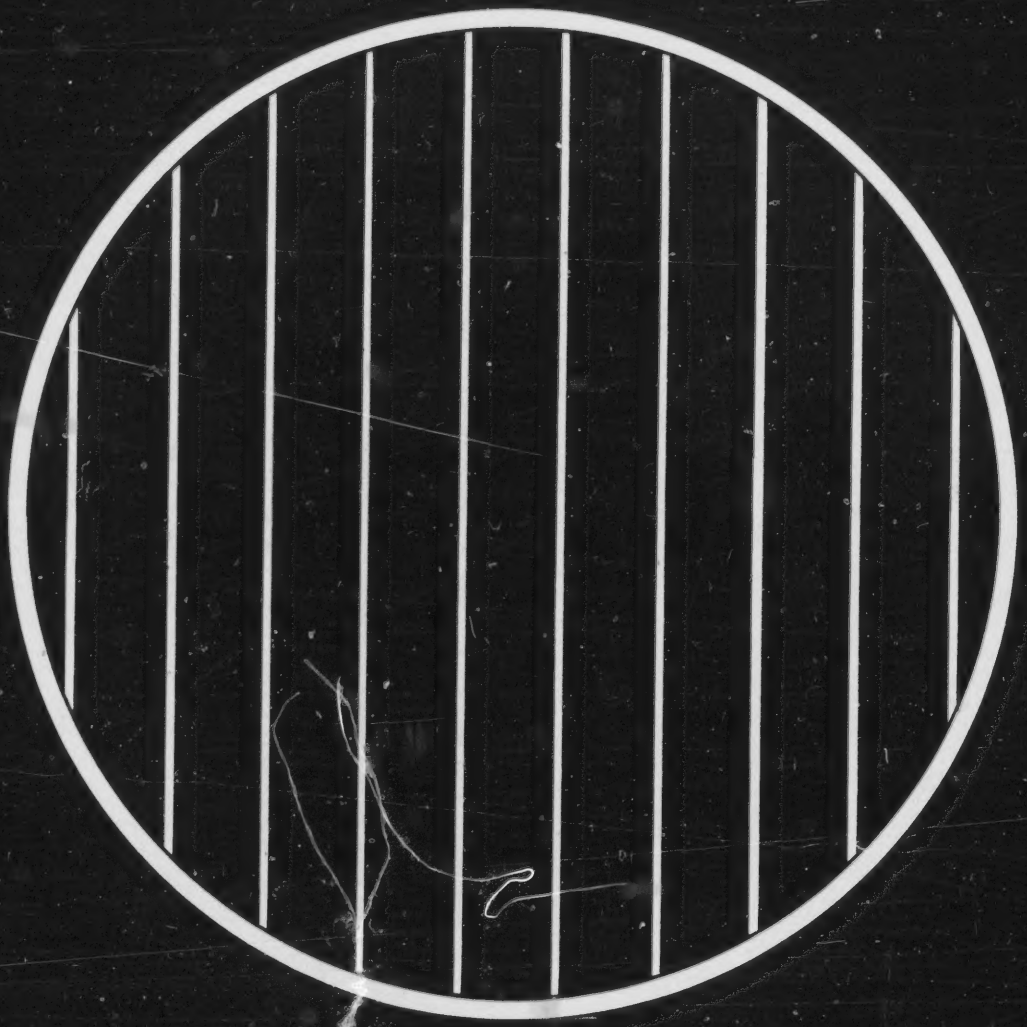
RVs
America's Family Camping Vehicles

A Year-End Report/1982

Recreation Vehicle Industry Association



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In the report that follows we will present results of RV production for 1982 in several ways. As usual, we will show product mix, regional and state-by-state sales patterns, wholesale and retail values and even a section on the RV consumer. What has changed this year is how we tell the story. Hopefully, the increased size of the graphic representations and color variations will aid you in understanding the changes that occurred throughout the year in each of the eleven RV product categories. Also, included for the first time this year is a graphic presentation of the RV industry in relation to widely accepted economic indicators (see Appendix, page 17).

The data used in this report was collated from a survey of RV manufacturers conducted annually. Historical information has been presented as a comparison where appropriate. Monthly reports on unit shipments and average wholesale price by length for each category of RV do not appear in this report; that information is available by contacting the RVIA Marketing Department. ■

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RVs . . . America's Family Camping Vehicles
A Year-End Report/1982

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Highlights of 1982

The road to recovery for the recreation vehicle industry, as with the general economy, has been a rough and most difficult one. Following two major energy crises in the mid and late '70s were the rapidly rising and stubbornly high interest rates of 1980 and 1981. While the U.S. economy began showing signs of strength late in 1982, the RV industry appears to have reversed its course long before that; RV wholesale shipments began improving in late 1980 and continued to do so throughout 1982.

In fact, except for the months of January, February and September, each month of 1982 exceeded 1981 levels, reaching total shipments of 258,000 units, a respectable 7.9% ahead of 1981, itself 31.9% better than 1980.

First quarter shipments improved a modest 1.6% over 1981, as fifth wheel travel trailers and type A motor homes continued their strong 1981 showing. Falling gasoline prices favored improved shipments but high interest rates remained a barrier for many consumers and double digit unemployment dominated the news.

Second quarter improvement was better as shipments increased by 16% over 1981; June was a pacesetter recording nearly 30,000 unit sales. Of particular interest was the growth of truck campers and type B Van campers, each 40% above 1981 levels. By now the pattern for 1982 was set, motor homes would show the largest gains over last year while towable units would continue to produce the largest unit volumes.

The third and fourth quarters nearly mirrored a year earlier results with the exception of September when totals were slightly below and December when they were substantially above 1981 levels.

Industry Sales Top $3.5 Billion

While total wholesale shipments increased by nearly 8%, the cumulative retail value of those shipments increased by more than 26% over 1981. Total retail value has been calculated at $3.5 billion, up from 1981's total of $2.8 billion (see page 6). Travel trailers represented 25.4% of all 1982 shipments, but they accounted for only 19% of the total retail value. By contrast, type A motor homes accounted for only one out of twelve RVs shipped but provided nearly one out of five total retail dollars.

Pacific States Still #1

California remained the largest consumer with 12.87% of all RV shipments, enabling the Pacific states to retain their historical regional edge. Note, however that despite record unemployment in some states in the East North Central region, that area remained in second place; in fact, its market share grew from 16.39% to 18.04% of total RVs in 1982. Texas ranked second in shipments, followed by Florida, Michigan, and Pennsylvania.

Further analysis of pages 7, 8 and 9 will reveal that the Pacific region led in five of the eleven vehicle categories while the East North Central led in four.

Changes in Product

There were some noticeable changes in the size of the RV products this year. In 1981 less than half of all fifth wheel travel trailers were under 30 feet long, but rather dramatic downsizing occurred for that group in 1982 (see page 13). Now 60% of them are under 30 feet and nearly four out of ten are under 25 feet in length. Folding camping trailers also reflect the trend to shorter length as one out of three was under eight feet in 1982; just one year ago only one out of four was that size.

Type A motor homes, however, show a surprising reverse trend as nearly half of all their shipments were over 29 feet in length, up from 1981 when the longer units were 40% of that market segment.

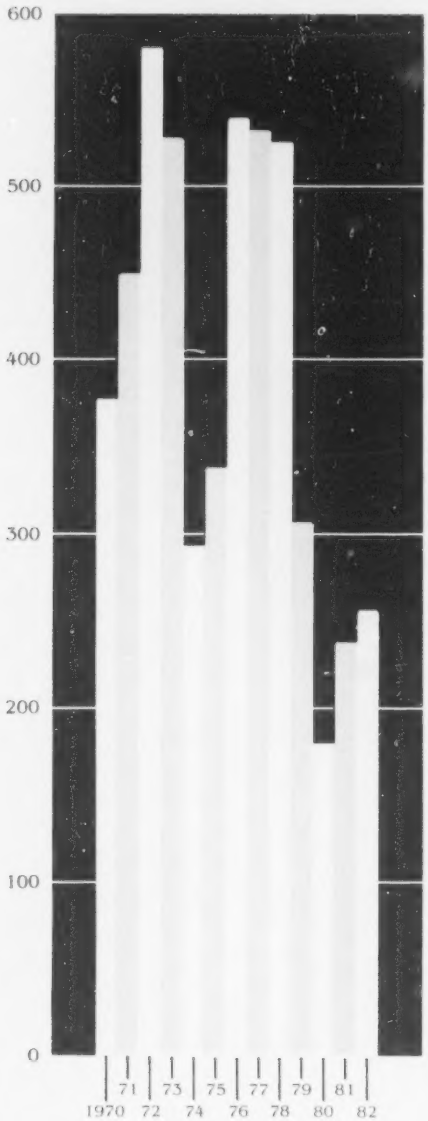
Campers are Avid RVers

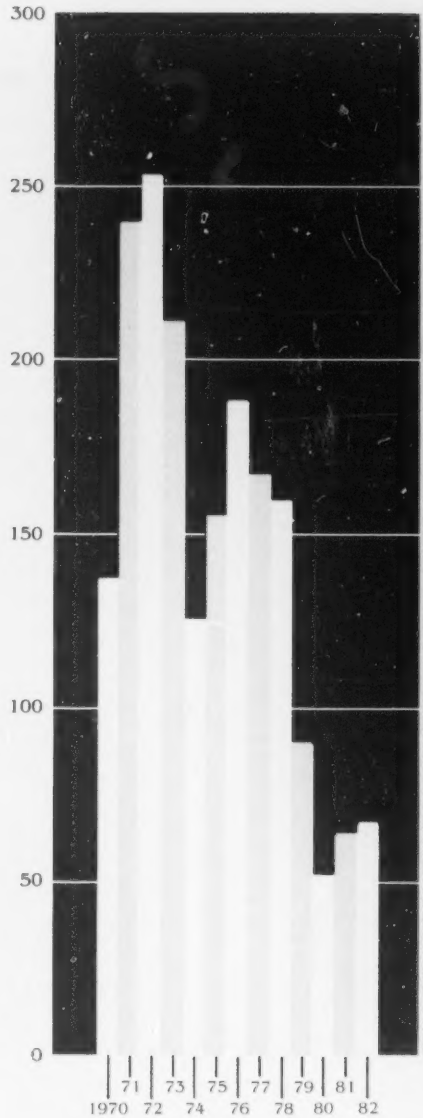
What does it all mean? The last word comes from RV consumers who appear to be saying that recreation has become, and will continue to be, a basic part of their lifestyle. We take a look at the camping consumer and his strong ties to the RV lifestyle as well as the potential for future RV sales on pages 15-16.

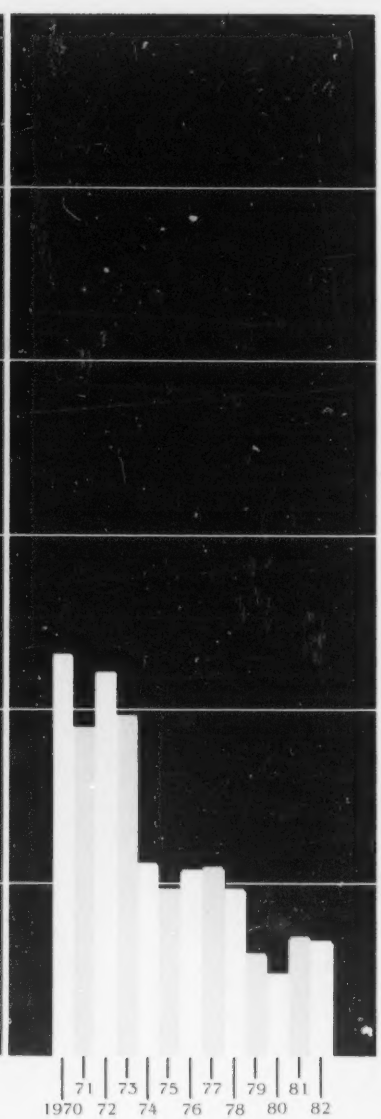
The trends in total sales, average price and product mix indicate that the largest group of current and potential RV bu[illegible]ose in the 35-44 age group) [illegible]etermined to have the benefits of recreation but want them combined with the practicality of product performance.

For each segment of the market the demand still exists for a produ[illegible] provides comfort and roo[illegible] combined with performanc[illegible] market offers the challenges [illegible] wards of creativity. ■

Family Camping Vehicle Shipments (in thousands)







Total Shipments

Year	Shipments
1982	**258.0**
1981	239.1
1980	181.4
1979	307.7
1978	526.3
1977	533.9
1976	541.1
1975	339.6
1974	295.8
1973	528.8
1972	582.9
1971	451.0
1970	380.3

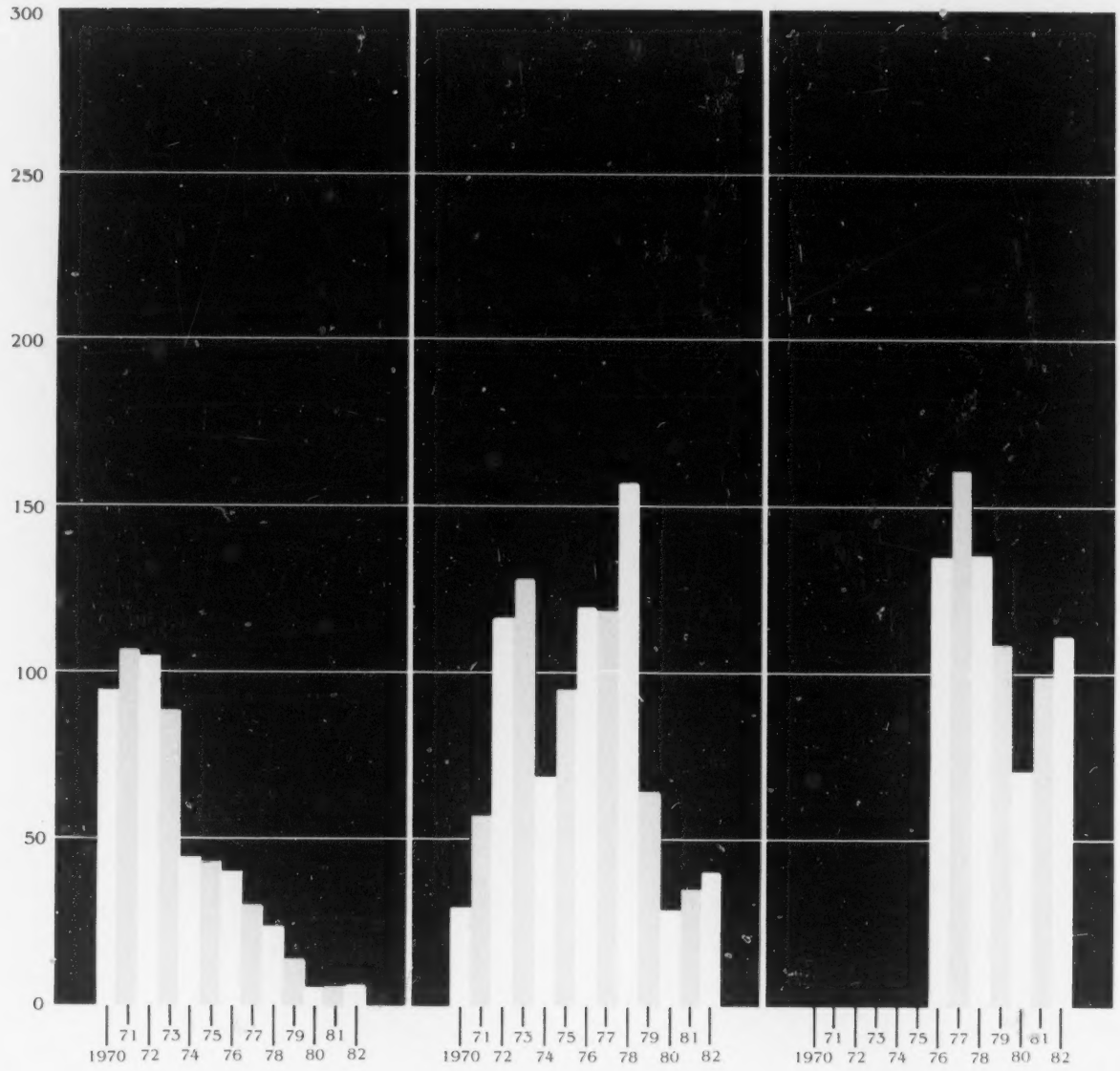
Travel Trailers (All Types)

Year	Shipments
1982	**65.5**
1981	63.8
1980	52.0
1979	90.2
1978	159.8
1977	167.9
1976	189.7
1975	150.6
1974	126.3
1973	212.3
1972	250.8
1971	190.8
1970	138.0

Folding Camping Trailers

Year	Shipments
1982	**34.3**
1981	35.0
1980	24.5
1979	31.1
1978	48.2
1977	53.9
1976	53.3
1975	48.1
1974	55.2
1973	97.7
1972	110.2
1971	95.8
1970	116.1

Shipments Review



Truck Campers

Year	Shipments
1982	**5.7**
1981	5.1
1980	5.0
1979	13.8
1978	24.7
1977	31.9
1976	42.0
1975	44.3
1974	45.4
1973	89.8
1972	105.1
1971	107.2
1970	95.9

Motor Homes (All Types)

Year	Shipments
1982	**41.2**
1981	35.4
1980	28.5
1979	64.1
1978	157.2
1977	119.4
1976	120.0
1975	96.6
1974	68.9
1973	129.0
1972	116.8
1971	57.2
1970	30.3

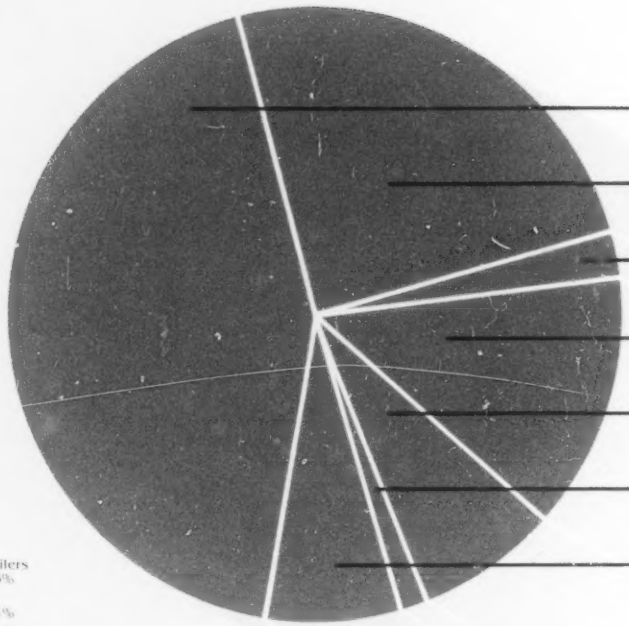
Van Conversions

Year	Shipments
1982	**111.3**
1981	99.8
1980	71.4
1979	108.5
1978	136.4
1977	160.8
1976	136.1
1975	*
1974	*
1973	*
1972	*
1971	*
1970	*

*No Van Conversion data prior to 1976

Market Share by Category/1982

Shipments

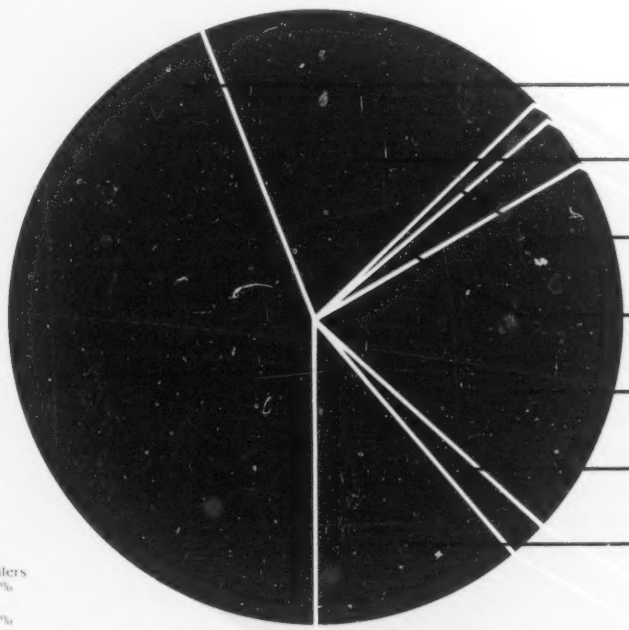


	Shipments in thousands	Percent of Total
Van Conversions	111.3	43.1%
Travel Trailers (All)[1]	65.5	25.4%
Truck Campers	5.7	2.2%
Folding Camping Trailers	34.3	13.3%
Motor Homes – Type A	19.3	7.5%
Van Campers – Type B	3.9	1.5%
Motor Homes – Type C[2]	18.0	7.0%
Total RVs	**258.0**	**100.0%**

1 Includes
Conventional Travel Trailers 47.7 18.5%
Park Trailers 6.1 2.4%
Fifth Wheel Trailers 11.7 4.5%

2 Includes
Motor Homes – Type C (Mini) 15.2 5.9%
Motor Homes – Type C (Low Profile) 1.1 0.4%
Motor Homes – Type C (Compact) 1.7 0.7%

Retail Value



	$ Value in Millions	Percent of Total
Van Conversions	$1,539.0	43.9%
Travel Trailers (All)[1]	666.0	19.0%
Truck Campers	28.3	0.8%
Folding Camping Trailers	109.6	3.1%
Motor Homes (Type A)	692.0	19.7%
Van Campers (Type B)	65.2	1.9%
Motor Homes (Type C)[2]	405.1	11.6%
Total RVs	**$3,505.2**	**100.0%**

1 Includes
Conventional Travel Trailers $436.8 12.5%
Park Trailers $ 87.3 2.5%
Fifth Wheel Trailers $141.9 4.0%

2 Includes
Motor Homes – Type C (Mini) $348.9 10.0%
Motor Homes – Type C (Low Profile) $ 27.6 0.8%
Motor Homes – Type C (Compact) $ 28.6 0.8%

Shipments by Region/1982

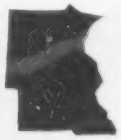
Pacific

Year	Percent
1982	**18.87%**
1981	20.86%
1980	20.25%
1979	21.58%
1978	22.85%

Mountain

Year	Percent
1982	**10.06%**
1981	10.62%
1980	9.65%
1979	10.00%
1978	10.11%

West North Central

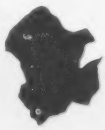


Year	Percent
1982	**10.15%**
1981	9.51%
1980	8.18%
1979	10.44%
1978	10.42%

West South Central

Year	Percent
1982	**14.43%**
1981	13.92%
1980	13.29%
1979	9.72%
1978	10.29%

East North Central



Year	Percent
1982	**18.04%**
1981	16.39%
1980	17.44%
1979	19.49%
1978	20.21%

East South Central

Year	Percent
1982	**3.50%**
1981	3.18%
1980	3.00%
1979	3.56%
1978	3.33%

South Atlantic

Year	Percent
1982	**12.42%**
1981	12.87%
1980	13.38%
1979	11.55%
1978	10.56%

Middle Atlantic

Year	Percent
1982	**8.77%**
1981	9.30%
1980	11.06%
1979	10.15%
1978	9.23%

New England

Year	Percent
1982	**3.74%**
1981	3.36%
1980	3.75%
1979	3.15%
1978	3.00%

Deliveries to States by RV Category/1982 (In Percentage)

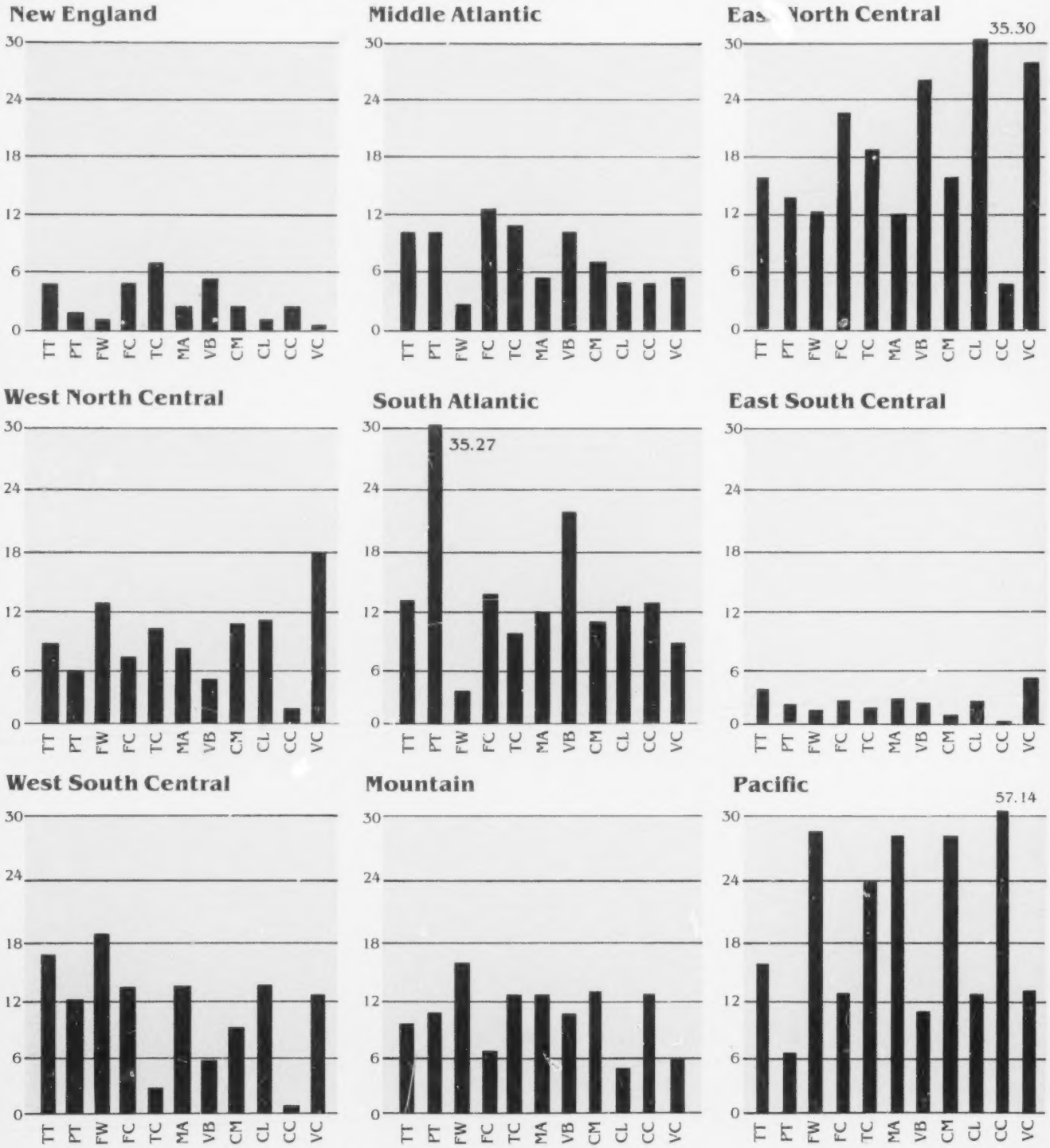
	Conventional Travel Trailers	Park Trailers	Fifth Wheel Trailers	Folding Camping Trailers	Truck Campers	Motor Homes Type A	Van Campers Type B	Motor Homes Type C (Mini)	Motor Homes Type C (Low Profile)	Motor Homes Type C (Compact)	Van Conversions	Total
New England	**5.06%**	**2.18%**	**1.28%**	**5.11%**	**7.09%**	**2.41%**	**5.65%**	**3.59%**	**1.07%**	**2.41%**	**.83%**	**3.74%**
Connecticut	.89	.74	.16	1.10	1.33	.34	.66	.58	.10	.43	.16	.69
Maine	.67	.03	.28	.67	.90	.14	1.16	.25	*	*	.06	.44
Massachusetts	1.97	.74	.38	2.12	2.47	1.05	2.16	1.34	.68	1.03	.36	1.48
New Hampshire	1.06	.37	.31	.51	2.08	.42	1.00	.65	.29	.86	.11	.66
Rhode Island	.25	.27	.08	.36	*	.40	.17	.66	*	*	.06	.29
Vermont	.22	.03	.07	.35	.31	.06	.50	.11	*	.09	.08	.18
Middle Atlantic	**9.91**	**9.85**	**3.09**	**13.72**	**10.78**	**5.56**	**9.97**	**7.00**	**4.89**	**4.82**	**5.71**	**8.77**
New Jersey	1.77	3.41	.20	2.60	1.02	1.16	2.66	1.17	.49	1.12	1.39	1.65
New York	3.35	1.38	1.59	4.77	5.84	2.22	3.49	2.89	1.08	2.15	.92	3.01
Pennsylvania	4.79	5.06	1.30	6.35	3.92	2.18	3.82	2.94	3.32	1.55	3.40	4.11
E. North Central	**15.68**	**13.70**	**12.34**	**22.67**	**19.27**	**12.28**	**25.58**	**15.88**	**35.30**	**5.24**	**29.04**	**18.04**
Illinois	3.60	4.08	2.57	4.27	2.70	2.63	2.99	3.49	6.26	.34	8.14	4.02
Indiana	3.25	2.50	3.80	3.70	4.74	3.09	3.32	4.27	6.65	1.46	6.14	3.80
Michigan	3.89	3.27	3.72	6.11	3.21	2.71	9.74	3.38	14.96	1.46	6.92	4.54
Ohio	3.58	2.53	1.51	5.73	4.27	2.66	8.47	3.18	5.28	1.64	6.39	4.03
Wisconsin	1.36	1.32	.74	2.86	4.35	1.19	1.33	1.26	2.15	.34	1.45	1.65
W. North Central	**8.96**	**5.86**	**12.97**	**7.60**	**10.38**	**9.51**	**5.33**	**10.82**	**11.44**	**2.49**	**17.97**	**10.15**
Iowa	1.69	.57	2.40	1.61	2.59	1.87	.50	2.19	1.17	.95	4.64	2.11
Kansas	1.22	.20	4.21	1.03	1.68	1.28	*	1.36	1.76	*	2.22	1.52
Minnesota	2.02	2.43	1.40	1.55	3.76	2.09	1.00	2.63	3.42	.77	1.85	1.96
Missouri	2.35	2.06	2.34	1.77	.78	1.95	3.16	1.71	2.74	17	5.33	2.41
Nebraska	.79	.20	1.40	1.26	.24	.66	.50	.64	1.08	*	2.45	1.06
North Dakota	.50	.27	.37	.09	1.06	.96	.17	1.48	.98	*	.92	.60
South Dakota	.39	.13	.85	.29	.27	.70	*	.81	.29	.60	.56	.49
South Atlantic	**13.38**	**35.27**	**4.57**	**13.87**	**10.03**	**12.26**	**22.09**	**11.07**	**12.53**	**13.17**	**8.81**	**12.42**
Delaware	.34	.30	.12	.19	.39	.05	.33	.14	.10	*	.07	.20
Florida	3.86	29.48	2.38	3.93	3.17	6.76	9.97	5.66	6.84	10.24	1.14	4.70
Georgia	1.25	.20	.46	1.95	1.76	1.04	.83	1.05	1.96	.52	1.46	1.29
Maryland	1.45	1.01	.24	1.71	1.18	1.14	1.16	.98	.20	.77	1.26	1.27
North Carolina	2.54	.91	.51	2.07	.94	1.51	3.49	1.22	.88	1.38	1.54	1.83
South Carolina	1.05	.67	.22	.96	.31	.36	.33	.32	1.08	*	.42	.71
Virginia	1.96	1.59	.51	2.20	1.65	.99	4.32	1.22	.98	.17	2.18	1.70
West Virginia	.93	1.11	.13	.86	.63	.41	1.66	.48	.49	.09	.74	.72
E. South Central	**4.09**	**2.70**	**1.99**	**3.07**	**2.46**	**3.63**	**2.82**	**1.61**	**3.03**	**.69**	**5.57**	**3.50**
Alabama	.95	1.01	.34	.67	.39	1.24	.66	.35	.68	*	.61	.80
Kentucky	.54	.54	.34	.74	.90	.34	1.00	.37	.59	.09	1.20	.60
Mississippi	.73	.17	.25	.25	.08	.45	.50	.27	.59	.17	1.31	.55
Tennessee	1.87	.24	1.06	1.41	.82	1.60	.66	.62	1.17	.43	2.45	1.55
W. South Central	**17.44**	**12.32**	**18.99**	**13.63**	**3.17**	**13.90**	**6.14**	**9.03**	**13.78**	**1.20**	**12.90**	**14.43**
Arkansas	1.12	.51	.81	.95	.43	.63	.33	.59	.98	*	1.38	.94
Louisiana	2.17	1.18	.87	1.05	.27	2.29	.50	1.30	1.27	.34	1.70	1.64
Oklahoma	2.72	2.77	5.75	2.18	.59	2.01	1.16	1.73	1.17	*	3.97	2.72
Texas	11.43	7.86	11.56	9.45	1.88	8.97	4.15	5.41	10.36	.86	5.85	9.13
Mountain	**9.75**	**10.90**	**16.46**	**7.06**	**12.69**	**12.67**	**11.29**	**13.28**	**4.99**	**12.82**	**5.90**	**10.05**
Arizona	1.83	8.77	2.02	1.53	3.84	4.24	8.31	3.85	1.56	3.27	1.99	2.55
Colorado	1.09	.24	3.30	1.20	2.78	2.33	*	3.09	1.27	2.75	1.18	1.66
Idaho	1.33	.03	2.59	.43	.63	.93	.83	.99	.10	1.03	.59	1.02
Montana	.89	.24	1.87	.36	.12	.98	.50	1.05	*	.95	.51	.80
Nevada	.79	.30	1.48	.76	.31	1.87	.33	1.14	.49	2.67	.20	.93
New Mexico	.97	.34	1.69	.77	2.51	.95	*	1.21	.98	.60	.28	.93
Utah	2.46	.37	2.91	1.72	1.76	1.00	.66	1.66	*	1.55	.87	1.80
Wyoming	.39	.61	.60	.29	.74	.37	.66	.29	.59	*	.28	.37
Pacific	**15.72**	**7.21**	**28.30**	**13.26**	**24.13**	**27.82**	**11.13**	**28.01**	**13.01**	**57.14**	**13.25**	**18.87**
Alaska	.21	.03	.26	.14	1.21	.30	*	.95	.20	.77	.12	.28
California	9.68	4.18	16.84	10.18	15.32	19.82	3.16	21.26	5.77	45.78	9.15	12.87
Hawaii	*	*	*	.02	*	*	*	*	*	*	.04	.01
Oregon	2.85	.34	6.03	.98	2.90	4.67	4.15	2.55	6.26	6.37	1.47	2.78
Washington	2.98	2.66	5.17	1.94	4.70	3.03	3.82	3.25	.78	4.22	2.47	2.93
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

*Not measurable

Regional Market Share by RV Category/1982

(In Percentage)

The Marketplace



Legend

TT	Conventional Travel Trailers
PT	Park Trailers
PW	Fifth Wheel Trailers
FC	Folding Camping Trailers
TC	Truck Campers
MA	Motor Homes – Type A
VB	Van Campers – Type B
CM	Motor Homes – Type C (Mini)
CL	Motor Homes – Type C. (Low Profile)
CC	Motor Homes – Type C (Compact)
VC	Van Conversions

National Market Share of RV Categories by Region/1982 (by Percent)

NE – New England
Connecticut,
Maine, Massachusetts,
New Hampshire, Rhode Island, Vermont

MA – Middle Atlantic
New Jersey, New York,
Pennsylvania

ENC – East North Central
Illinois, Indiana,
Michigan, Ohio, Wisconsin

WNC – West North Central
Iowa, Kansas, Minnesota,
Missouri, Nebraska, North Dakota,
South Dakota

SA – South Atlantic
Delaware, Florida, Georgia,
Maryland, North Carolina,
South Carolina, Virginia, West Virginia

ESC – East South Central
Alabama, Kentucky,
Mississippi, Tennessee

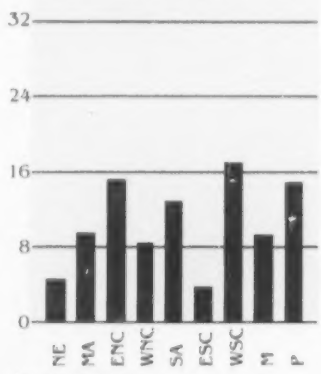
WSC – West South Central
Arkansas, Louisiana, Oklahoma, Texas

M – Mountain
Arizona, Colorado, Idaho, Montana,
Nevada, New Mexico, Utah, Wyoming

P – Pacific
Alaska, California, Hawaii, Oregon
Washington

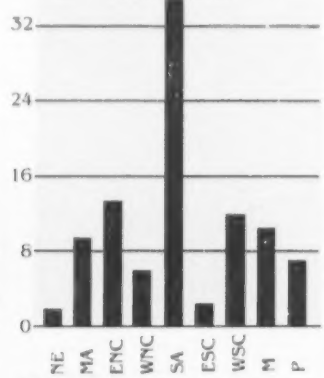
Conventional Travel Trailers

Value	1982	1981	1980
Whsl.	$ 7,320	$ 7,283	$ 7,124[1]
Retail	9,150	9,104	8,905[1]



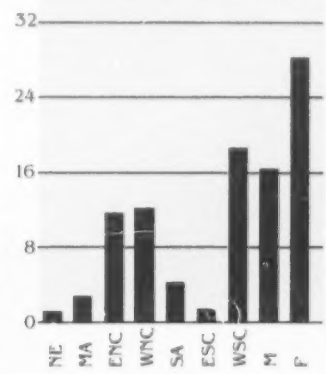
Park Trailers

Value	1982	1981	1980
Whsl.	$ 11,534	$ 10,370	*
Retail	14,417	12,963	



Fifth Wheel Trailers

Value	1982	1981	1980
Whsl.	$ 9,677	$ 9,647	$ 9,854
Retail	12,096	12,059	12,318

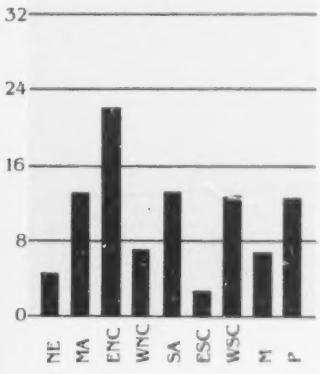


[1] Includes Park Trailers

* Prior to 1980, Park Trailer data not surveyed

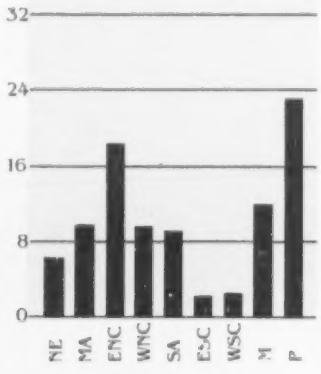
Folding Camping Trailers

Value	1982	1981	1980
Whsl.	$ 2,457	$ 2,316	$ 2,155
Retail	3,194	3,011	2,801



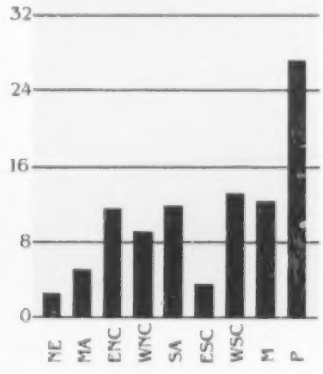
Truck Campers

Value	1982	1981	1980
Whsl.	$ 3,864	$ 3,072	$ 2,610
Retail	5,02[illegible]	3,994	3,393



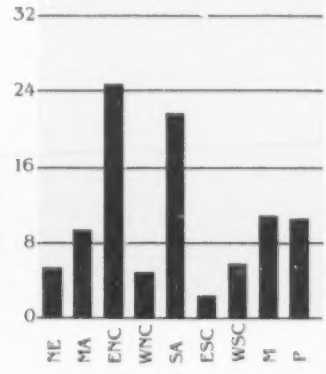
Motor Homes Type A

Value	1982	1981	1980
Whsl.	$ 28,621	$ 26,196	$ 13,076
Retail	35,776	32,745	28,845



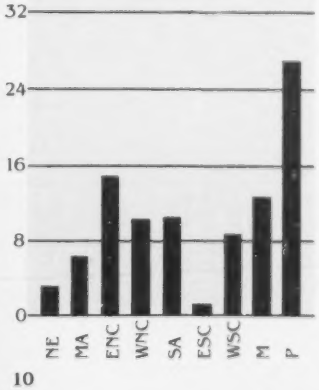
Van Camper Type B

Value	1982	1981	1980
Whsl.	$ 13,234	$ 11,372	$ 11,319
Retail	16,542	14,215	14,149



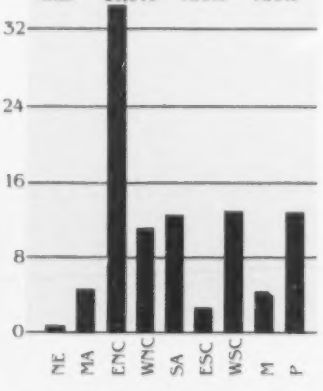
Motor Home Type C (Mini)

Value	1982	1981	1980
Whsl.	$ 18,359	$ 16,649	$ 14,344
Retail	22,948	20,811	17,930



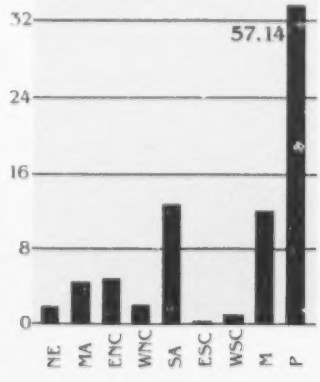
Motor Home Type C (Low Profile)

Value	1982	1981	1980
Whsl.	$20,833	$ 15,130	$13,210
Retail	26,041	18,913	16,513



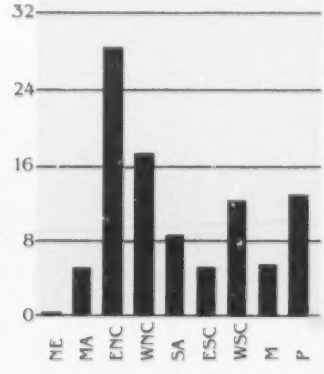
Motor Home Type C (Compact)

Value	1982	1981	1980
Whsl.	$ 13,827	$ 12,513	$ 10,609
Retail	17,283	15,641	13,261



Van Conversions

Value	1982	1981	1980
Whsl.	$ 11,521	$ 9,587	$ 9,152
Retail	13,825	11,504	10,982



RV Unit Deliveries to States by Years, 1976 – 1982 (in percentage)

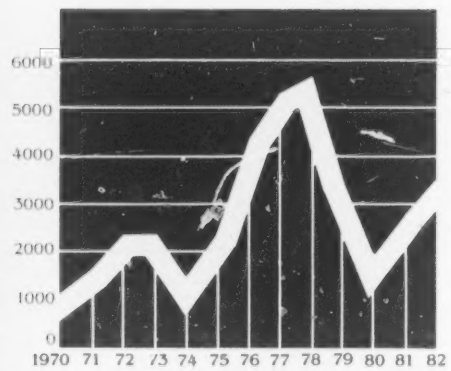
	1982	1981	1980	1979	1978	1977	1976
New England	**3.74%**	**3.36%**	**3.75%**	**3.15%**	**3.00%**	**3.46%**	**3.61%**
Connecticut	0.69	0.59	0.68	0.67	0.61	0.66	0.70
Maine	0.44	0.39	0.33	0.42	0.44	0.62	0.54
Massachusetts	1.48	1.35	1.54	1.17	1.16	1.27	1.40
New Hampshire	0.66	0.59	0.77	0.52	0.46	0.60	0.62
Rhode Island	0.29	0.28	0.30	0.22	0.17	0.17	0.19
Vermont	0.18	0.16	0.13	0.15	0.16	0.14	0.16
Middle Atlantic	**8.77**	**9.30**	**11.05**	**10.15**	**9.23**	**9.77**	**9.97**
New Jersey	1.65	1.62	1.62	1.50	1.45	1.45	1.47
New York	3.01	3.40	4.15	4.39	3.82	3.84	3.74
Pennsylvania	4.11	4.28	5.29	4.61	3.96	4.48	4.76
East North Central	**18.04**	**16.39**	**17.44**	**19.49**	**20.21**	**21.05**	**22.17**
Illinois	4.02	3.55	3.32	3.85	3.88	4.30	4.60
Indiana	3.80	3.51	3.62	3.83	3.54	3.50	3.78
Michigan	4.54	3.65	4.47	4.89	5.93	5.69	5.95
Ohio	4.03	4.06	4.36	4.76	4.79	5.20	5.23
Wisconsin	1.65	1.62	1.67	2.15	2.07	2.36	2.61
West North Central	**10.15**	**9.51**	**8.18**	**10.44**	**10.42**	**10.81**	**12.29**
Iowa	2.11	2.15	1.78	2.21	2.17	2.17	2.54
Kansas	1.52	1.53	1.60	1.36	1.52	1.79	2.10
Minnesota	1.96	1.91	1.61	2.64	2.57	2.62	2.81
Missouri	2.41	1.90	1.85	2.05	2.03	1.91	2.19
Nebraska	1.06	0.88	0.70	0.98	0.97	0.99	1.09
North Dakota	0.60	0.57	0.23	0.63	0.58	0.68	0.86
South Dakota	0.49	0.57	0.41	0.57	0.58	0.65	0.70
South Atlantic	**12.42**	**12.87**	**13.38**	**11.55**	**10.56**	**10.02**	**10.95**
Delaware	0.20	0.22	0.33	0.21	0.23	0.20	0.22
Florida	4.70	4.85	4.77	3.65	3.17	2.61	2.57
Georgia	1.29	1.35	1.32	1.50	1.29	1.31	1.43
Maryland	1.27	1.27	1.42	1.45	1.31	1.41	1.52
North Carolina	1.83	2.06	1.95	1.51	1.60	1.52	1.61
South Carolina	0.71	0.84	0.77	0.62	0.59	0.56	0.65
Virginia	1.70	1.39	1.79	1.47	1.48	1.53	2.10
West Virginia	0.72	0.87	1.03	1.14	0.89	0.88	0.85
East South Central	**3.50**	**3.18**	**3.00**	**3.56**	**3.33**	**3.02**	**2.95**
Alabama	0.80	0.83	0.71	1.08	0.94	0.66	0.69
Kentucky	0.60	0.50	0.43	0.60	0.83	0.85	0.65
Mississippi	0.55	0.51	0.42	0.57	0.46	0.40	0.47
Tennessee	1.55	1.34	1.44	1.32	1.10	1.11	1.14
West South Central	**14.43**	**13.92**	**13.29**	**9.72**	**10.29**	**10.32**	**11.03**
Arkansas	0.94	0.84	0.94	0.71	0.73	0.69	0.72
Louisiana	1.64	2.07	2.15	1.33	1.34	1.12	1.23
Oklahoma	2.72	3.07	1.98	1.76	1.87	2.08	2.30
Texas	9.13	7.94	8.22	5.92	6.35	6.43	6.78
Mountain	**10.06**	**10.62**	**9.65**	**10.00**	**10.11**	**9.84**	**8.76**
Arizona	2.55	2.34	1.70	1.63	1.68	1.44	1.38
Colorado	1.66	1.61	2.01	2.19	2.18	2.52	2.42
Idaho	1.02	1.24	1.11	1.10	1.40	1.32	1.12
Montana	0.80	0.87	0.65	0.87	0.87	0.87	0.59
Nevada	0.93	1.28	1.05	1.05	0.84	0.58	0.54
New Mexico	0.93	1.08	0.68	1.02	0.98	1.03	1.08
Utah	1.80	1.75	2.04	1.66	1.71	1.59	1.26
Wyoming	0.37	0.45	0.41	0.48	0.45	0.49	0.37
Pacific	**18.87**	**20.86**	**20.25**	**21.58**	**22.85**	**21.71**	**18.26**
Alaska	0.28	0.31	0.09	0.18	0.30	0.30	0.25
California	12.87	14.80	14.33	14.49	14.68	13.73	11.60
Hawaii	0.01	0.02	0.01	0.01	0.01	0.01	0.02
Oregon	2.78	2.56	2.63	3.10	3.51	3.36	2.87
Washington	2.93	3.17	3.19	3.80	4.35	4.31	3.52
Total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Note: Parts may not add to totals due to rounding.

Source: Data for shipment statistics are obtained from an annual survey to RV manufacturers and are calculated from completed survey forms.

Retail Value of RV Shipments (in millions)

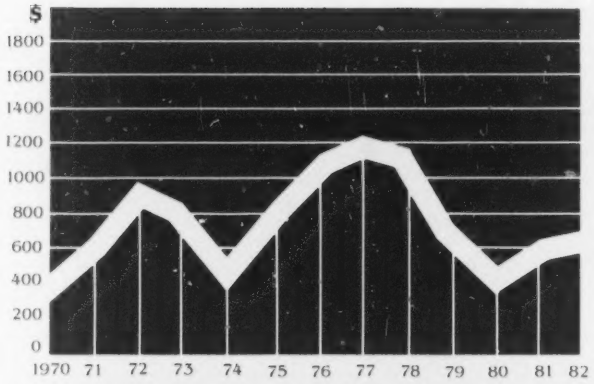
Total Value



Year	Total Value	% Change All Types
1982	**$3,505.2**	**+26.3**
1981	2,774.8	+42.2
1980	1,950.7	−45.0
1979	3,581.5	−37.0
1978	5,682.8	+ 6.7
1977	5,326.7	+24.3
1976	4,283.9	+84.6
1975	2,320.0	+66.7
1974	1,392.1	−40.1
1973	2,322.4	−1.8
1972	2,364.9	+48.1
1971	1,597.2	+42.4
1970	1,122.0	+7.6

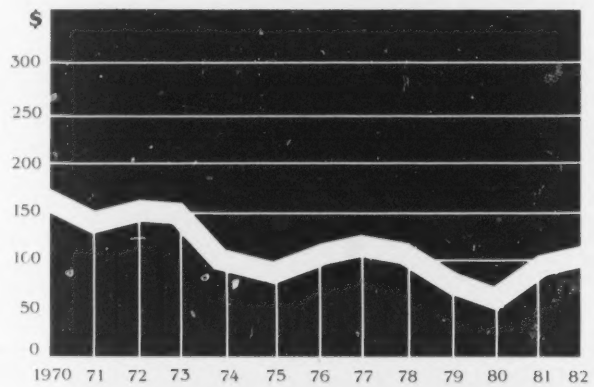
All Travel Trailers

Year	Value
1982	**$666.0**
1981	631.1
1980	484.6
1979	725.1
1978	1,153.0
1977	1,229.2
1976	1,132.0
1975	856.0
1974	566.6
1973	842.6
1972	971.1
1971	650.2
1970	445.3



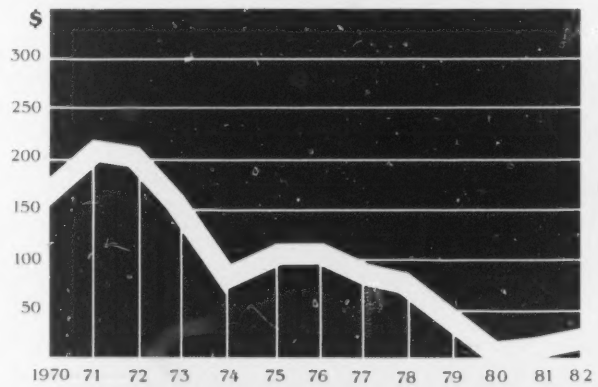
Folding Camping Trailers

Year	Value
1982	**$109.6**
1981	105.3
1980	68.6
1979	83.3
1978	115.8
1977	123.2
1976	116.8
1975	101.0
1974	108.9
1973	160.1
1972	165.5
1971	150.9
1970	175.3



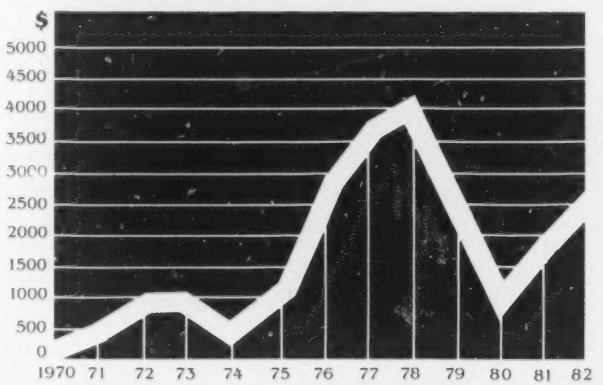
Truck Campers

Year	Value
1982	**$ 28.3**
1981	20.3
1980	17.0
1979	47.5
1978	84.9
1977	98.5
1976	112.2
1975	112.0
1974	92.3
1973	166.9
1972	217.8
1971	233.6
1970	183.2



All Motor Homes*

Year	Value
1982	**$2,701.3**
1981	2,018.1
1980	1,380.5
1979	2,725.6
1978	4,329.1
1977	3,875.8
1976	2.922.9
1975	1,250.0
1974	624.3
1973	1,152.8
1972	1,010.5
1971	572.5
1970	318.2



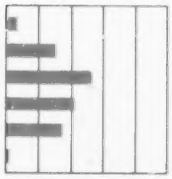
*Includes Van Conversions

Market Structure
By Category and Length

Conventional Travel Trailers

Length	1982	1981	1980	1979	1978	1977	1976
Under 16'	4.9%	4.1%	2.1%	3.0%	1.8%	1.5%	2.2%
16' to 19'11"	18.3	16.7	13.5	15.2	14.2	11.7	14.0
10' to 24'11"	31.4	34.2	30.8	38.4	42.9	39.8	47.6
25' to 29'11"	24.1	23.5	29.2	28.8	28.3	28.7	36.1[1]
30' to 35'	21.3	19.1	22.2	13.4	12.4	18.1	
Over 35'	0.1	2.4	2.2	1.2	0.5	0.2	
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

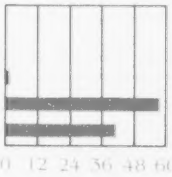
1982 Market Share



Park Trailers

Length	1982	1981	1980	1979	1978	1977	1976
Under 20'							
20' to 24'11"							
25' to 29'11"	.2%	.1%					
30' to 35'	58.3	63.0					
Over 35'	41.5	36.8					
	100.0%	100.0%					

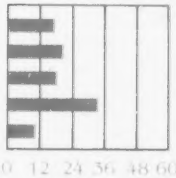
Market Share



Fifth Wheel Travel Trailers

Length	1982	1981	1980	1979	1978	1977	1976
Under 20'	17.1%	10.5%	6.2%	1.7%	0.9%	2.1%	4.5%
20' to 24'11"	20.8	16.7	10.2	12.2	17.8	19.4	16.9
25' to 29'11"	18.1	17.2	16.6	19.5	22.6	28.0	32.6
30' to 35'	33.1	42.0	51.9	55.9	53.9	47.0	46.1[2]
Over 35'	11.0	13.7	15.2	10.7	4.8	3.5	
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

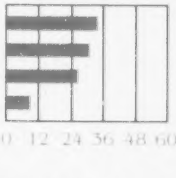
Market Share



Folding Camping Trailers

Length	1982	1981	1980	1979	1978	1977	1976
Under 8'	33.8%	24.8%	17.7%	15.9%	14.1%	12.7%	9.6%
8' to 9'11"	30.6	26.5	29.1	37.9	32.1	29.0	28.1
10' to 12'	26.5	32.1	36.1	31.5	34.6	36.9	36.3
Over 12'	9.2	16.7	17.1	14.7	19.2	21.4	25.9
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

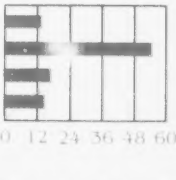
Market Share



Truck Campers

Length	1982	1981	1980	1979	1978	1977	1976
Under 8'	13.5%	18.7%	17.3%	13.5%	6.9%	8.5%	7.4%
8' to 9'5"	54.6	57.6	61.8	54.2	56.4	53.6	54.0
9'6" to 10'6"	17.1	14.2	12.7	19.1	20.4	20.5	20.1
Over 10'6"	15.1	9.5	8.2	13.1	16.3	17.4	18.5
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

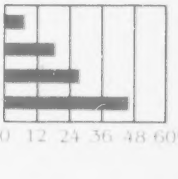
Market Share



Motor Homes – Type A

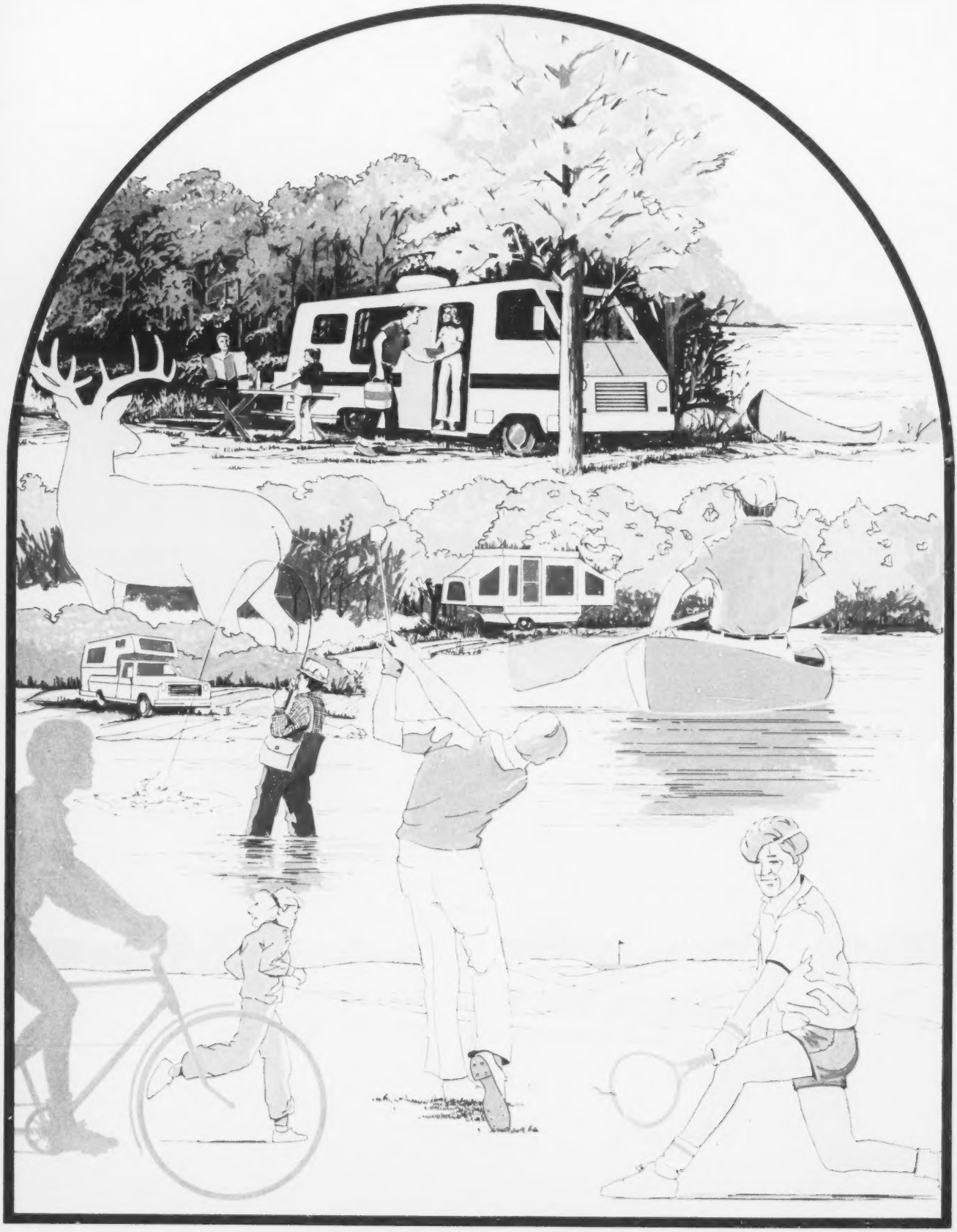
Length	1982	1981	1980	1979	1978	1977	1976
Under 23'	7.5%	2.1%	9.1%	7.7%	12.4%	8.8%	*
23' to 25'11"	18.7	37.0	29.7	40.8	43.6	47.3	*
26' to 29'	27.6	22.2	23.4	16.7	18.1	22.2	*
Over 29'	46.5	38.8	37.8	34.8	25.9	21.7	*
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Market Share



[1]Includes vehicles 25' and over.
[2]Includes vehicles 30' and over.
* Data are not comparable.

NOTE: Parts may not add to totals due to rounding.



The Consumer

Camping: An All American Favorite

Despite ever-increasing competition from a wide range of participant sports, camping continues to be one of America's favorite sporting activities, according to a new study by the A. C. Nielsen Company.*

More than 60 million Americans camped last year, the study reported. By 1985, that figure will grow to 61.6 million and by 1990 it will increase to 64.4 million, Nielsen predicted.

60 million Americans camped in 1982!

More than one out of every four persons in the study said they have camped within the past year.

In fact, camping is the third most popular participant sport in America among adults, surpassed only by swimming and fishing, the report concluded. It also ranks third, behind swimming and bicycling, among children under 12 years of age. Only among teenagers does camping's popularity wane at all, as teenagers ranked it only sixth among the sports listed in the study.

Among the host of widely-accepted sports that camping exceeds in popularity among all three of the age groups are: bowling, boating, jogging, softball, tennis, skiing, hunting, golf, ice skating, soccer, billiards and even physical conditioning.

This is the fourth time that Nielsen has made its Sports Participation Study over the past 10 years. Camping has held its lofty position in each of the previous studies, but each time the competition has increased as Americans become more active in various sports and more are added to the Nielsen list. The previous studies were made in 1973, 1976 and 1979.

Camping is most popular among persons between the ages of 18 and 34, as 33.6% of all respondents in that group reported having camped in the past year, the study revealed. A total of 31.1% of those 12 to 17 have also camped recently. Only 12.4% of the persons aged 55 or older said the same.

Encouraging news for the camping industry is that the 18 to 34 group also happens to represent the largest percentage of the U.S. population. According to the most recent U.S. Census, nearly 30% of all Americans are aged 18-34, meaning that the biggest portion of the population currently falls into the most popular age range for camping.

Extremely encouraging for the RV industry is the knowledge, garnered from a previous study by the University of Michigan Survey Research Center, that the largest RV ownership rate is among individuals 35 to 54. As today's large number of 18 to 34-year-old campers get older, and take their camping experiences with them, the RV industry is likely to benefit tremendously.

The camping participation rate is more than twice as high in the West as it is in the East, the study reported. A total of 42% of all Westerners are

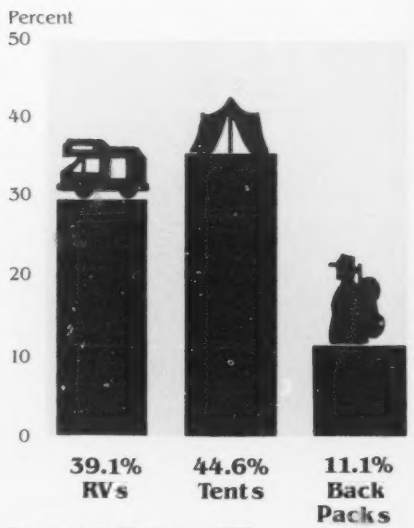
Favorite Sports Among U.S. Adults*

	1982	1979	1976	1973
Swimming	1	1	1	1
Fishing	2	2	2	2
CAMPING	3	3	3	3
Bicycling	4	4	4	5
Bowling	5	5	5	4
Boating	6	6	7	7
Tennis	10	9	9	11
Hunting	13	12	10	9
Golf	12	13	11	10

* Selected Participant Activities. List includes some 30 activities.

Source: A. C. Nielsen – 1982

Method of Camping



Source: A. C. Nielsen – 1982

* 1982 Sports Participation Study
The Sport of Camping
A. C. Nielsen Company
Marketing Research Group USA
Northbrook, IL 60062

campers, while only 19% of all Northeasterners participate in the activity. North Central (27%) and Southern (23%) residents fall in between.

The Nielsen study also questioned campers about their family incomes and found that 50% have incomes above $25,000. A total of 33% fell into the $15,000-$25,000 income range and only 18% reported they earned less than $15,000.

The frequency of camping participation has decreased somewhat, from 16.9 days in 1979 to 13.2 days in the 1982 study, but the average reported stay increased from 1979's 5.3 days to 1982's 5.6 days. The report further revealed that 24.5% of the camping trips were of one to two days' duration, the great majority of them (41.9%) lasted three to four days, another 10.3% were from five to six days, while 22.9% lasted a week or more. This is most likely an indication of the effect on travel that increasing fuel prices and the weak economy had during the past three years. Clearly, campers took less trips but stayed longer when they did go.

The Nielsen survey also explored American's favorite method of camping and found that there are almost as many RV campers as there are tent campers in this country. A total of 39.1% of all campers used an RV, while 44.6% used tents and the remainder were backpackers, the study reported.

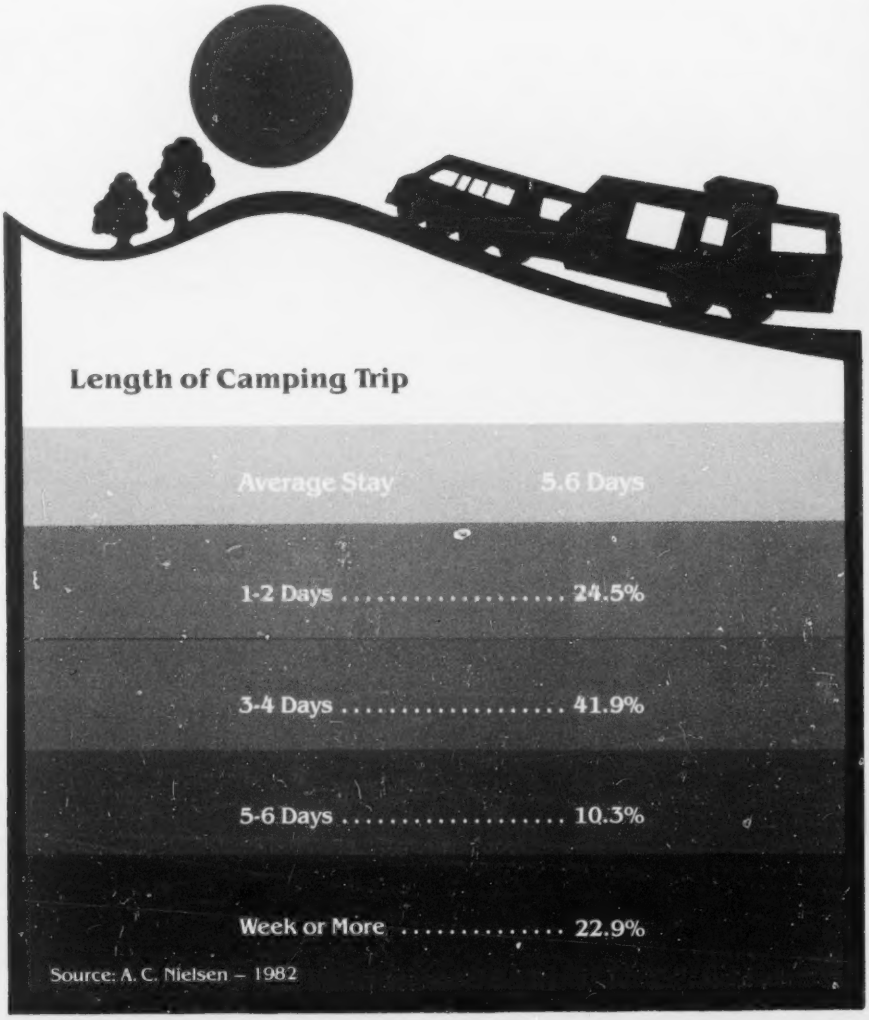
This, perhaps, is the most encouraging news of all for the RV industry, as it confirms the industry's claim that more than 23 million Americans are involved in recreation vehicle camping. ■

Campers by Age, Region and Income

	U.S. Census Distribution	Camping Participants	Index of Participants
All Individuals	100.0	26.6	100.0
Age:			
Under 12 years	17.8	29.6	111.3
12-17 years	9.9	31.1	116.9
18-34 years [1]	**29.7**	**33.6**	**126.4**
35-54 years [2]	**22.0**	**26.0**	**97.7**
55 and older	20.6	12.4	46.6
Census Region:			
North East	21.4	19.0	71.4
North Central	25.9	26.9	101.1
South	33.8	22.5	84.6
West [3]	**18.9**	**42.5** [3]	**159.8**
Total Family Income:			
Under $15,000	25.1	17.9	67.3
$15,000-$25,000	29.7	32.6	122.6
Over $25,000 [4]	**45.2**	**49.5**	**186.1**

[1] Most campers
[2] Most RV owners
[3] Most camping region
[4] Most campers

Source: A. C. Nielsen – 1982

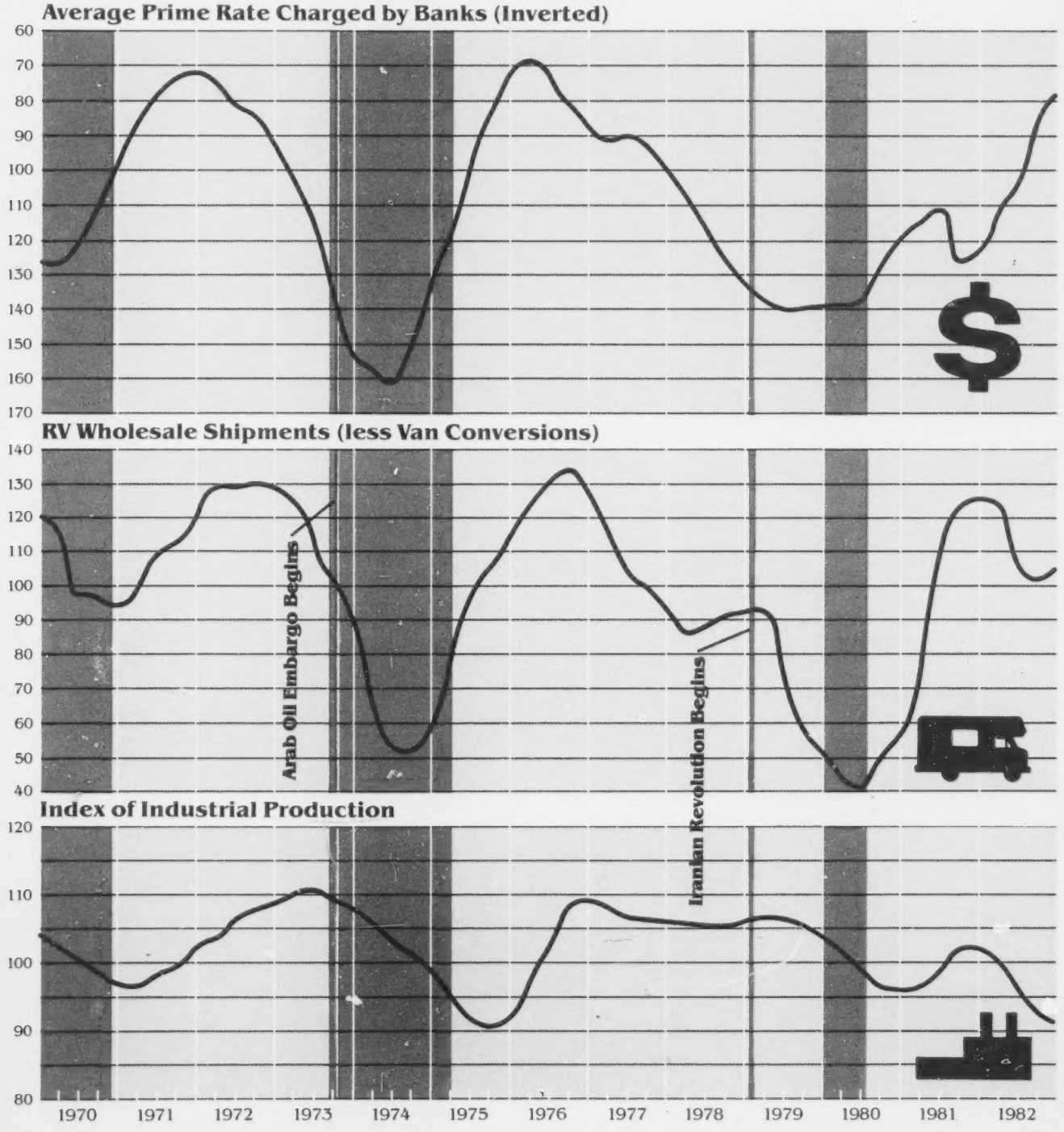


Appendix

Cyclical Indicators

The chart below depicts rate of change of a twelve month moving average for Average Prime Rate Charged by Banks (inverted), RV Wholesale Shipments (less Van Conversions) and the Index of Industrial Production. The shaded areas represent periods of recession.

What is most significant about these three economic indicators is their relative lead/lag time relationship. Over the past twelve years cyclical turning points of the prime interest rate have led RVs by just over nine months. Industrial production has followed RVs by an average of a little more than four months. ■

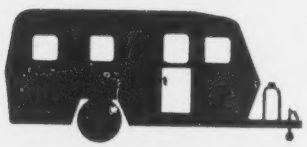


Shaded areas represent periods of recession

Vehicle Categories

Travel Trailer

A trailer designed to be towed by a motorized vehicle (auto, van or pick-up truck) and of such size and weight as not to require a special highway movement permit. It is designed to provide temporary living quarters for recreational, camping or travel use and does not require permanent on-site hook-up. A travel trailer can be one of the following types:

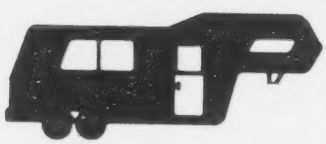


Conventional Travel Trailer

Ranges typically from 12 feet to 35 feet in length, and is towed by means of a bumper or frame hitch attached to the towing vehicle.

Park Trailer

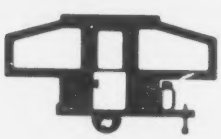
Designated for seasonal or temporary living. When set up, may be connected to utilities necessary for operation of installed fixtures and appliances. Built on a single permanent chassis mounted on wheels and capable of being towed without special highway movement permits by a motorized vehicle. Not more than 40 feet overall body length and no more than 8 feet in overall body width when in the traveling mode. Designed for set-up by persons without special skills using only hand tools which may include lifting, pulling or supporting devices.



Fifth-Wheel Travel Trailer

This unit can be equipped the same as the conventional travel trailer but is constructed with a raised forward section that allows a bi-level floor plan. This style is designed to be towed by a vehicle equipped with a device known as a fifth-wheel hitch.

Folding Camping Trailer



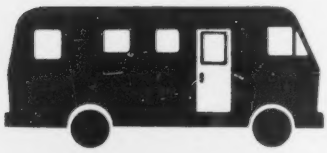
A recreation camping unit designed for temporary living quarters which is mounted on wheels and constructed with collapsible sidewalls that fold for towing by a motorized vehicle.

Truck Camper

A recreational camping unit designed to be loaded onto, or affixed to, the bed or chassis of a truck, constructed to provide temporary living quarters for recreational, camping or travel use.

Motor Home

A recreational camping and travel vehicle built on or as an integral part of a self-propelled motor vehicle chassis. It may provide kitchen, sleeping and bathroom facilities and is equipped with the ability to store and carry fresh water and sewage. A motor home can be one of the following types:



Conventional Motor Home – Type A

The living unit has been entirely constructed on a bare, specially designed motor vehicle chassis.

Van Camper – Type B

A panel-type truck to which the RV manufacturer adds any two of the following conveniences: sleeping, kitchen and toilet facilities, also 110 volt hook-up, fresh water storage, city water hook-up, and a top extension to provide more head room.

Motor Home – Type C (Mini)

This unit is built on an automotive manufactured van frame with an attached cab section of a GVWR of 6500 pounds or more, with an overall height of more than eight feet. The RV manufacturer completes the body section containing the living area and attaches it to the cab section.

Motor Home – Type C (Low Profile)

This unit is built on an automotive manufactured van frame with an attached cab section having a GVWR of 6500 pounds or more, with an overall height of less than eigth feet. The RV manufacturer completes the body section containing the living area and attaches it to the cab section.

Motor Home – Type C (Compact)

This unit is built on an automotive manufactured cab and chassis having a GVWR of less than 6500 pounds. It may provide any or all of the conveniences of the large units.

Van Conversion

A completed van chassis modified esthetically or decoratively in appearance by the RV manufacturer for transportation and recreational purposes. These changes may include windows, carpeting, paneling, seats, sofas, and accessories.